

## Cal Grant Application Checklist

For a new school applying to participate in the Cal Grant Program

**Note:** Please provide a cover sheet for each item number submitted. If your institution is requesting for participation for more than one location, please submit additional forms for item numbers 3, 4, 7 and 10 for each location.

1. ☐ Cal Grant Institutional Participation Agreement (IPA)
  - Page 1: List of officials must be listed with the U.S. Department of Education
  - Page 2: Fill in the name of your institution
  - Page 16: Fill in your institution's information. Provide additional location information, if applicable
  - Page 17 and 18: President/Chief Executive Officer (CEO)/Chancellor must initial in applicable areas
  - Page 19: President/CEO/Chancellor must sign the Cal Grant IPA
2. ☐ Cal Grant Program Review Survey
  - Provide a copy of your institution's Eligibility and Certification Approval Report (ECAR)
3. ☐ College Cost Estimate Form
  - If your institution has more than one program, please submit one form for each program
4. ☐ Institutional Contacts Form
  - List of officials must be listed with the U.S. Department of Education
  - Financial Aid Director cannot be the same person as the Chief Fiscal Officer
  - Provide a copy of your institution's organizational chart
5. ☐ System Administrator's Access Request Form
  - Authorized Official cannot be the same person as the System Administrator
  - Authorized Official and System Administrator align with those listed in the Institutional Contacts Form
6. ☐ Information Security and Confidentiality Agreement
  - Authorized Official cannot be the same person as the System Administrator
7. ☐ Electronic Fund Transfer (EFT) Form
  - Bank must have a California presence
  - Provide interest bearing documentation: a copy of the bank statement or a letter from your banking institution
8. ☐ Third-Party Audited Financial Statement Reports
  - Must cover at least the 2 most recently completed fiscal years
9. ☐ Institutional Catalog
  - Provide a current copy of your institution's catalog
  - Identify your financial aid disbursement policy, financial aid refund policy, and satisfactory academic progress policy
  - If your main campus resides outside the state of California, the catalog must be provided for California based campuses
10. ☐ CA License Exam Reporting

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11. ☐ Student Safety Policy Statement (California Education Code 67386)
  - Written statement must be signed by the President/CEO/Chancellor
12. ☐ Title IX or California Equity in Higher Education Act Exemption
  - If your institution holds exemption from Title IX provisions, provide copies of all materials submitted to and received from the U.S. Department of Education granting the exemption
  - If your institution holds exemption to the California Equity in Higher Education Act, provide a statement for your institution's basis for exemption.

*Non-Public institutions qualifying under CEC 69432.7(l)(1)(A) under the Pell Grant and in at least two other federal student aid programs must submit:*

13. ☐ Proof of Authorization of Title IV Funding from U.S. Department of Education (G-5 Report)
  - Clearly identify the following federal student aid programs for the current academic year: Pell Grant, Federal Supplemental Education Opportunity Grant (FSEOG), Stafford Direct Loan Program, or Federal Work-Study (FWS)
14. ☐ Proof of Disbursement of Title IV Funds to Students
  - Student ledgers must clearly identify disbursements to students for: Pell Grant, FSEOG, Stafford Direct Loan Program, or FWS
  - FWS must identify student to location and demonstrate payment for work

*Non-Public Institutions qualifying under CEC 69432.7(l)(1)(B) under the 10% Rule*

15. ☐ Financial Statement and Demonstration of Administrative Capability Form